



USER MANUAL

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System Requirements

To ensure the best performance using HotDocs®, please note the following requirements for hardware and software:

HotDocs 11 User or Developer

Hardware:

900 MHz processor (2 GHz recommended)

1 GB RAM (2 GB, recommended)

50 MB hard disk storage

1024 x 768 screen resolution with at least 16-bit color

Software:

Microsoft® Windows® 8 (32-bit or 64-bit), Microsoft® Windows® 7 (32-bit or 64-bit), Windows Vista® (32-bit or 64-bit), or Windows® XP (SP1 or higher)

(Visit: <http://support.microsoft.com/lifecycle/> for Microsoft Windows Support Lifecycle policy.)

Microsoft® Internet Explorer® 6.0 or later Microsoft® Office®** Word 2013, 2010, 2007 or,

Microsoft® .NET® Framework 3.5 and 4.0 Client Profile

Microsoft® Silverlight® 3

Note: If you are using Office 2007 it is recommended that you install SP3 or higher to access the most up-to-date features.

Note: HotDocs® will work on Macintosh® with a supported version of Windows® installed in a virtualization program. We cannot provide technical support regarding running on Macintosh® however we will support any question related to Rocket Docket Legal Software installed on any platform.

Technical Support:

Technical Support is available to help you use Rocket Docket®. If you are having difficulties installing or using the software contact us at the following:

Internet: <https://rocketdocketlegalsoftware.freshdesk.com/support/home>

Please check the knowledge base for an answer to your support question or open a new support ticket if there is not an answer.

Telephone: (866) 890-2055

Rocket Docket's Mission

Our mission is to enable you to create perfect documents in case after case with simple mouse clicks. The work this program does would be impossible without blending the technologies of HotDocs, Rocket Docket, Microsoft Word and Microsoft Outlook.

This system is designed for extreme speed volume and accuracy.

Used as intended, it is easily capable of completing several days' work in a morning.

We designed the system from the perspective of the needs of the correspondences, cover letters, fax cover sheets and affidavits of service because they are an integral part of the work and use the exact same information as the forms.

Once the basic case information is entered it usually takes longer to print, sign and place the work in envelopes than it does to do the work. The errors are eliminated because the information is managed by a database not susceptible to human error.

Anytime a work flow is created in a word processor, human error is inevitable.

Rocket Docket was designed to create the work flow inside the database and finish in the word processor.

By using HotDocs to connect Microsoft Outlook contacts to letter and form templates most work can now be done with simple clicks of the mouse.

The vast majority of information in every case is the contacts. As such, the chore of formatting these contacts into letters and forms was done once by us so you never have to do it again.

Every letter and form created in Rocket Docket is customized with the particular contacts in the case.

If you deal with the same courts for different clients, letters and forms will be done with simple mouse clicks.

If you have clients with multiple matters then selecting them into each new case or workflow will be done with simple mouse clicks.

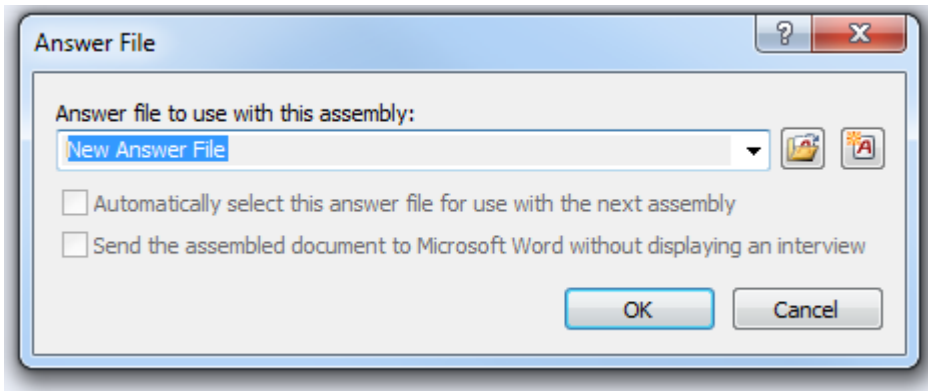
If you focus in one of our practice areas, the work will become very simple.

By focusing on the contacts in designing the system we eliminated gathering, finding, replacing, copying, cutting, pasting and the related errors.

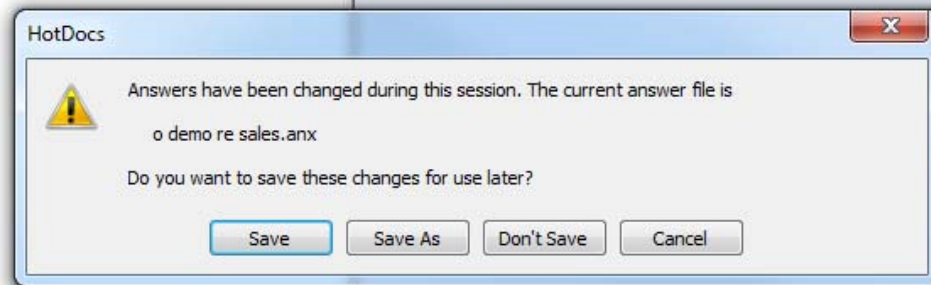
We welcome your comments and input. Please feel free to suggest forms for inclusion that would benefit your practice and enhance the useability of this software in your practice.

HotDocs

HotDocs is a database. The work you do in each case is saved in Answer Files. The answer files are opened and saved just like any other type of file. When you start Rocket Docket you will see this prompt. You may open a new Answer File by clicking OK or open an existing file. The drop down contains recently used Answer Files and the buttons to the right open new or open existing.



HotDocs® saves case specific information to “Answer Files” and all other information directly to the database for use in other cases. At the beginning of an assembly the user is prompted to select an answer source. The drop down arrow will reveal recently used answers. The Open Answers button will allow an existing answer file to be selected. The New Answer button will allow a New Answer File in the event that you have set the Last Answer to Appear in Options.



Answer Files

Rocket Docket saves all data entered into “Answer Files”. Data saved to the answer files do not need to be reentered in future assemblies.

Generally answers will be saved to a specific client and file. If a particular client has several matters then you would save answers to separate files for the client.

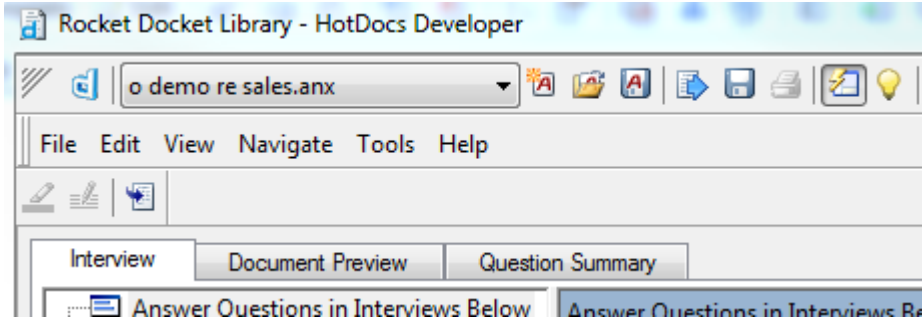
At the end of the assembly the user is prompted to save the answers. By selecting “Save” all case information programmed by Rocket Docket to save is saved.

Note.

If prompted to save the word document from HotDocs choose No and check Do Not Ask again.

To save a draft that is earlier than the one you are finishing will leave you with a different draft than the one you are sending to the word processor for finishing.

Answer Files



Answer Files

When you return to work on the file your answers do not have to be reentered.

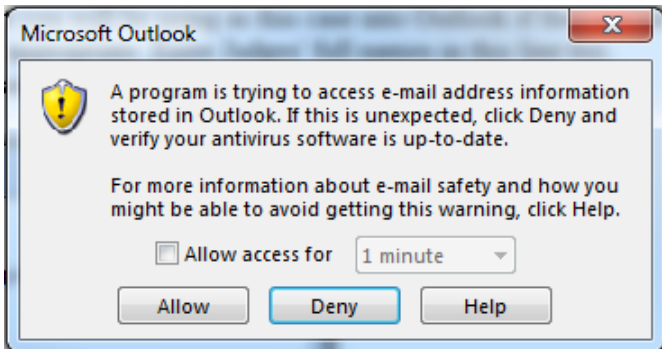
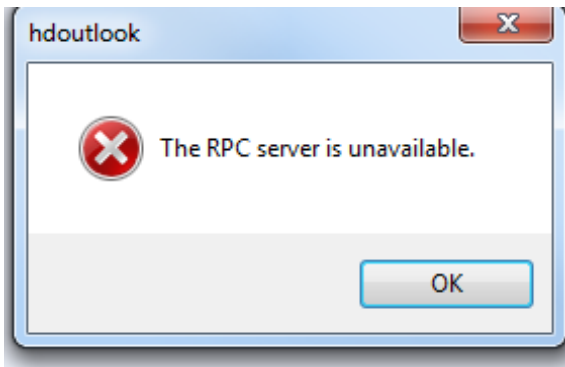
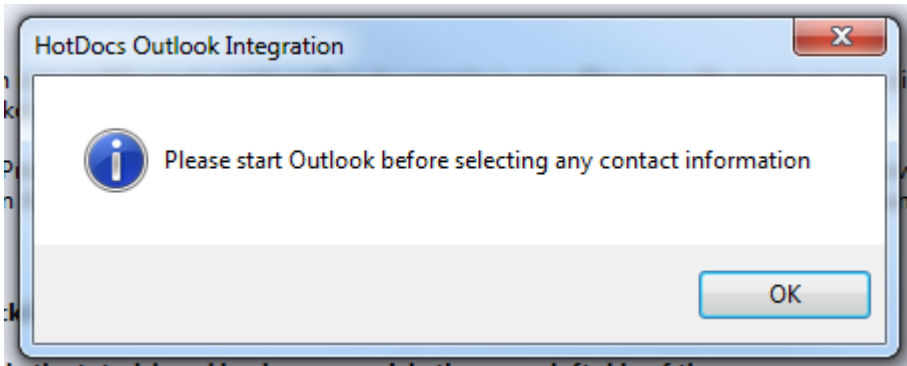
The drop down arrow will reveal recently used answers.

The left "A" is new Answer File.

The Middle "A" is open Answer File.

The right "A" is Save Answers.

Outlook



Outlook Error Messages and Warnings

Outlook MUST be running before HotDocs is started.

If not you will see error messages.

If you get the error RPC server is unavailable message close Rocket Docket, Close HotDocs, start Outlook and then reenter Rocket Docket

Choose allow at this screen. This is Outlook protecting your computer and is normal.

Microsoft Word ribbon: FILE | **CONTACT** | INSERT | FORMAT TEXT | REVIEW

CONTACT ribbon tabs: Save & New, Delete, Forward, OneNote, Show, Communicate (Email, Meeting, More), Names (Address Book, Check Names), Options (Business Card, Picture), Tags (Categorize, Follow Up, Private), Zoom (Search, Zoom)

Form Fields:

- Full Name...
- Company: Albany County Supreme Court
- Job title
- File as: Court, Albany County Supreme
- Internet: E-mail...
- Display as
- Web page address
- IM address
- Phone numbers:
 - Business...: (518) 285-8989
 - Home...
 - Business Fax...: (518) 487-5020
 - Mobile...
- Addresses:
 - Business...: Albany County Courthouse, Room 102, 16 Eagle Street, Albany, New York 12207
 - ☒ This is the mailing address
 - Map It

Notes section: Albany County Supreme Court, (518) 285-8989 Work, Albany County Courthouse, Room 102, 16 Eagle Street, Albany, New York 12207

Outlook Contacts

When entering new Contacts, fill the text boxes with all of the information that you have for the particular contact.

You may come back later and enter more information as it is received but you will have to reselect it into the case again for the information to update inside Rocket Docket.

The “Full Name” line at the top is reserved for natural person names.

If there is no natural person in the address leave it blank.

Fill the address as illustrated as Outlook looks for City, State Zip on one line.

The preceding lines are recognized by Outlook and Rocket Docket as the street and/or PO Box.

John Q. Public - Contact

FILE CONTACT INSERT FORMAT TEXT REVIEW

Save & Delete Close Save & New Forward OneNote Show Email Meeting More Communicate Address Book Check Names Names Business Card Picture Options Categorize Follow Up Private Tags Zoom Zoom

Full Name... Mr. John Q. Public

Company Acme Corp

Job title

File as Public, John Q.

Internet

E-mail... public@acme.com

Display as John Q. Public (public@acme.com)

Web page address

IM address

Phone numbers

Business... (646) 123-3213

Home...

Business Fax... (646) 321-1231

Mobile...

Addresses

Business... 123 Main Street
Islip, New York 11751

☒ This is the mailing address

Map It

Mr. John Q. Public
Acme Corp
(646) 123-3213 Work
public@acme.com
123 Main Street
Islip, New York 11751

Notes

Natural Names in Outlook

When entering natural names in Outlook make sure to include the prefix Mr. Ms., etc.

Rocket Docket is programmed to look for natural names so that if one is entered, the recipient's name with the prefix will be in every salutation and when absent, the salutation will be Dear Sir/Madam:

All address blocks are similarly formatted. Every fax cover and letter in Rocket Docket is programmed to automatically place in the Re: the "Case Title" which is typed in once together with case, docket or index numbers also entered once.

Contacts View

Click here to add a new Contact

rickmanp...		Alvey, Doug	+1 (518) 522-6910	
	Supreme Court, Appellate Division	Appellate Division 3rd Dept	(518) 471-4777	(518) 471-4750
	United States District Court - Eastern District o...	Clerk, USDC - EDNY	(631) 712-6000	
	Albany City Court - Civil Part	Court, Albany City - Civil Part	(518) 453-4640	(518) 453-8679
	Albany City Court - Criminal Part	Court, Albany City - Criminal Part	(518) 453-5520	(518) 453-8990
	Albany City Court - Traffic Part	Court, Albany City - Traffic Part	(518) 453-4630	(518) 453-8699
	Albany County Court	Court, Albany County	(518) 285-8777	(518) 453-8697
	Albany County Family Court	Court, Albany County Family	(518) 285-8600	(518) 462-4248
	Albany County Supreme Court	Court, Albany County Supreme	(518) 285-8989	(518) 487-5020
	Albany County Surrogate Court	Court, Albany County Surrogate	(518) 285-8585	(518) 462-0194
	Altamont Village Court	Court, Altamont Village	(518) 861-8554	(518) 861-5379
	Athens Town Court	Court, Athens Town	(518) 945-3360	(518) 945-1372
	Ballston Spa Village Court	Court, Ballston Spa Village	(518) 885-6393	(518) 885-3864
	Bethlehem Town Court	Court, Bethlehem Town	(518) 439-9717	(518) 475-1822
	Broome County Supreme Court	Court, Broome County Supreme	(607) 240-5800	(607) 240-5940
	Champlain Town Court	Court, Champlain Town	(518) 298-2043	
	Clifton Park Town Court	Court, Clifton Park Town	(518) 371-6668	(518) 371-3963
	Coeymans Town Court	Court, Coeymans Town	(518) 756-8480	(518) 756-7730
	Cohoes City Court	Court, Cohoes City	(518) 453-5501	(518) 233-8202
	Colonie Town Court	Court, Colonie Town	(518) 783-2714	(518) 782-2669
	East Greenbush Town Court	Court, East Greenbush Town	(518) 477-5412	(518) 477-6539
	Florida Town Court	Court, Florida Town	(518) 843-6468	(518) 843-1949
	Fort Ann Town Court	Court, Fort Ann Town	(518) 639-4088	(518) 639-8665
	Greene County Supreme Court	Court, Greene County Supreme	(518) 444-8760	(518) 843-0247
	Greenville Town Court	Court, Greenville Town	(518) 966-4873	(518) 966-4873
	Guilderland Town Court	Court, Guilderland Town	(518) 356-1980	(518) 357-9160
	Halfmoon Town Court	Court, Halfmoon Town	(518) 371-2592	(518) 371-0258
	Hope Town Court	Court, Hope Town	(518) 924-3821	
	Malta Town Court	Court, Malta Town	(518) 888-2787	(518) 888-2712

Selecting Contacts from Outlook into the Interview

When selecting a contact into Rocket Docket from Microsoft Outlook simply double click the contact and it will be brought into the interview.

Outlook often opens behind other open windows.

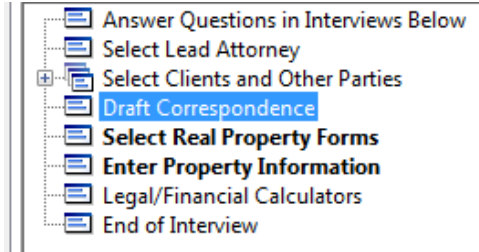
The system may seem frozen but it is only waiting for you to make your selection from Outlook.

When you click the select button to enter Outlook the system forces you make your selection from Outlook before moving on.

Usually the Outlook Icon in the taskbar is blinking to warn you that the window is open behind another window.

Correspondence

The correspondence engine built into Rocket Docket is the heart of the system and the reason it can work instantly update every form and letter with very simple input.



Rocket Docket was designed to allow you to create multiple simultaneous fax covers and letters to multiple recipients simultaneously for filing and service.

The correspondences require simple clicks for complete assembly.

The Attorney and Non Attorney choices are repeats so you may select multiple recipients and will automatically place the names, fax numbers and Re: information without any additional input.

By selecting and filling the affidavit information, an affidavit of service will be automatically created with a filled caption and all of the required information regarding who was served and how.

Correspondence



[How Correspondence Works](#)

Letters (Select all that apply)

- | | |
|--|---------------------------------------|
| <input checked="" type="checkbox"/> County Clerk | <input type="checkbox"/> Judge |
| <input type="checkbox"/> Court Clerk | <input type="checkbox"/> Magistrate |
| <input type="checkbox"/> Attorney | <input type="checkbox"/> Agency |
| <input type="checkbox"/> Non-Attorney | <input type="checkbox"/> Municipality |

Select Letterhead

Rocket Docket Letterhead
Custom Letterhead
Suppress Letterhead

Affirmation Service Date

February 6, 2015

Service Affidavit

Affidavit of Service
Affirmation of Service
Certificate of Service

Service by:

Mail
Fax
E-mail or ECF
Fax and Mail

Documents Being Served

1	
2	
3	
4	

Correspondence

The "Draft Correspondence" Interview opens the Correspondence page.

From this page you may create multiple simultaneous correspondences and fax covers and an affidavit of service.

Each library presents you with the categories of recipients that are present in the type of case you are working on.

In litigation files for example, you often correspond with clerks and lawyers and judges.

Selections are made with simple mouse clicks and speed and accuracy is the result.

CLIENT CORRESPONDENCE

The screenshot shows a software interface with a light blue background. At the top, the title "CLIENT CORRESPONDENCE" is displayed in bold black text. Below the title, there are three main sections. The first section, "Draft Letter to Client", is enclosed in a dashed rectangular border. The second section, "Client's Funds", contains three buttons: "Receive Funds", "Enter Expenses", and "Escrow Account". The third section, "Agreements and Invoices", contains a list box with four items: "Client Letter", "Retainer Agreement", "Engagement/NonEngag", and "Invoice (Hourly)". The list box has a small icon of a document with a list on the right side.

Rocket Docket has three letter head choices.

The screenshot shows a "Select Letterhead" dialog box. It has a title bar that says "Select Letterhead". Inside the dialog box, there is a list box with three items: "Rocket Docket Letterhead", "Custom Letterhead", and "Suppress Letterhead". The "Rocket Docket Letterhead" item is currently selected and highlighted in blue.

Rocket Docket letterhead is automatically created with your personal firm information that you entered when you first ran the program. The firm attorney interview allows all of the firm's attorneys to be entered and when a lawyer in the case changes, reselecting the new lawyer into the case will automatically update every letter and form unless and until attorney is replaced again.

If you prefer to use your own letterhead, simply create a gif file of your letterhead, copy it to templates folder and name it "Letterhead.gif". Then you may select "Custom Letterhead" and your letterhead will appear in the place of the Rocket Docket created letterhead.

If you print letterhead from a drawer you may "Suppress letterhead" which will leave a 3 inch space at the beginning of each correspondence.

Client Correspondence

Client correspondence is mission control for client communications time and billing.

You can draft a letter, retainer agreement; engagement and non-engagement; invoices and receipts by selecting with the mouse.

The time and billing features are basic, simple to use and extremely powerful.

The math updates in real time before printing. The forms that use the math update in real time as soon as you select them.

If for example, you have entered your time into the invoice and then prepare a client affidavit requesting counsel fees, the math is automatically updated and inserted into the form.

In fact all of the math in Rocket Docket automatically updates in every form that uses it.

You no longer have to switch between forms to update. You no longer have to update Excel spreadsheets one line at a time and you can't make a mistake.

Contact Interviews

Interviews Below

tion
er Parties

nts
ny Court Clerk

nd Appearances

ons
s
e
its

ators

Select Supreme/County Court Clerk

Schenectady County Supreme Court

[NY Counties](#)

[NY Unified Court](#)

Schenectady County Supreme Court
Schenectady County Judicial Building
612 State Street
Schenectady, New York 12305

Phone (518) 285-8401
Fax (518) 451-8731

Create Fax Cover?
Create Letter?

Delivery Instructions

Fax
Email
Fax and Mail
Fax and Email

Letter

Initial Appearance Letter
Requesting Adjournment?
Requesting Extension?
Filing Documents?

Contacts

Every contact interview has a check box for one click fax covers and letters. The correspondence interviews work as other interviews.

If you enter a specific delivery option the information will be computed into the correspondence.

For example if you enter "Fax"

The Via Fax (xxx) xxx-xxxx will be placed above the address block.

If you enter "Fax and Mail" the Via line will be entered and Rocket Docket will also create an address block for mailing.

The information is always visible so you no longer have to search for phone numbers, fax numbers etc.

The HotDocs Database

The power of Microsoft Outlook would not be available to the Rocket Docket forms and letters without HotDocs.

Enter the Database

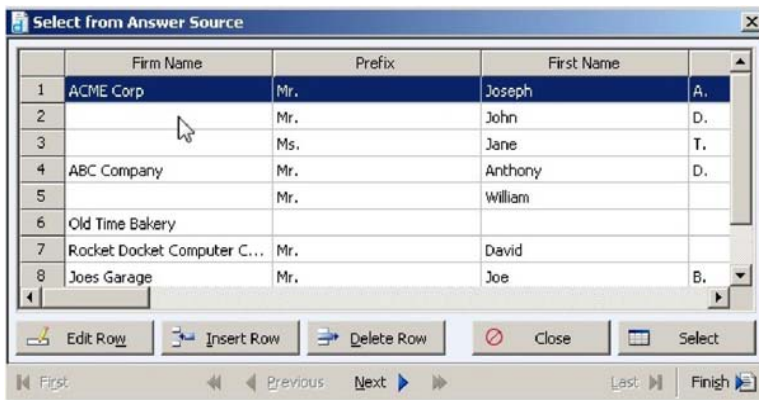
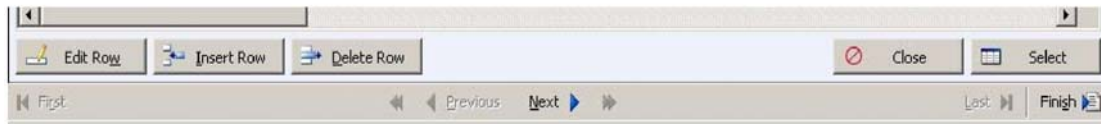


HotDocs

Entry into the database is always with the “Select” button.

All data is entered into and selected out of the database with this button which appears in various interviews.

Any information entered into the database is available for use in all other cases.



When you press the select button you enter the database. At the bottom of the database view there are buttons to edit – insert – delete rows and to select and close.

To select an existing contact highlight it and press select. Some interviews allow multiple selections.

Pressing “Insert Row” will add a new row.

Pressing “Edit Row” will bring up a screen to allow the new information to be entered into the main database.

Document Preview Screen

Rocket Docket - HotDocs Developer

File Edit View Navigate Tools Help

New Answer File

Interview Document Preview Answer Summary

STATE OF NEW YORK
PRINCETOWN TOWN COURT COUNTY OF SCHENECTADY

Jane T. Roe)
Petitioner(s))
vs.)
John D. Doe III)
Respondent(s))

Case Number: 23132

NOTICE OF PETITION TO RECOVER
POSSESSION OF REAL PROPERTY
(NON PAYMENT)

To the Respondent(s) above named and described, in possession of the premises hereinafter
234 Maple Avenue, Troy, New York 12180

TAKE NOTICE that a hearing on the annexed Petition to recover possession of said premises w
Princetown Town Court
165 Princetown Plaza
Princetown, New York 12306

TAKE FURTHER NOTICE that at the above time and place you may answer the Petition either

TAKE FURTHER NOTICE that demand is made in the Petition herein for Judgment against y
of \$1,350.00, and additional rent for laundry in the amount of \$70.00; water in the amount
together with daily cost of occupancy of the premises from the last rent charge until the Land
proceeding.

TAKE FURTHER NOTICE that if you fail to interpose and establish any defense that you may
which it is based in any other proceeding or action.

Dated: December 17, 2011
Albany, New York

Document Preview

Document Preview should be constantly used.

Inside Document Preview, you can check your work for missing and answered information.

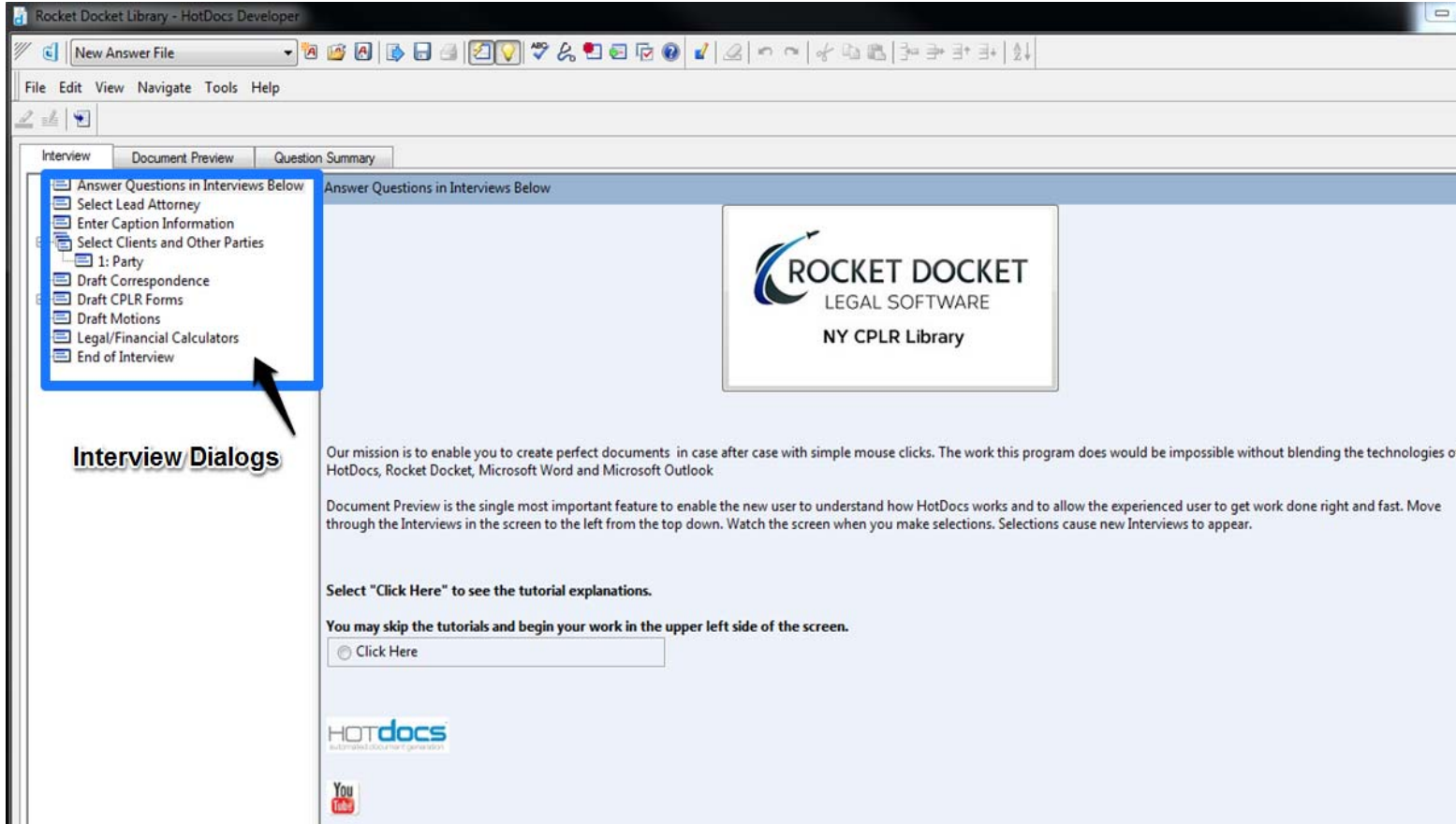
You can also copy directly from the document preview and paste directly into other applications which is extremely useful.

Often, depending on the job this is actually faster and easier than sending the work to the word processor.

Often documents do not appear properly formatted in the preview but will paste perfectly into the word processor.

You can also right click on variable in Document Preview and be brought to the Answer in the Interview for the question.

Rocket Docket Interviews



The interviews are generally filled from top to bottom. They have been designed to be as intuitive as possible.

Most selections in the interviews cause questions and whole interviews to appear and disappear. Rocket Docket was designed to present you with the questions you need to answer to complete the task you instructed it to do. The goal is to eliminate clutter and irrelevant questions from view.

There are some questions that may not be relevant to the particular work flow but may not disappear. You can easily check document preview to see if the particular question needs to be answered for the current work flow.

Select Lead Attorney

Interview | Document Preview | Question Summary

Select Lead Attorney

Use the Select Button to add or change the case attorney responsible for the current Answer File

You should add all attorneys in the firm into the database

Select

Select Lead Attorney

In the first Interview Dialog you will select the attorney into the case by clicking the select button.

Select from Answer Source

	Firm Name	Prefix	First Name	MI	Last Name	Suffix	Address
1	David Brickman PC	Mr.	David		Brickman		1664 Western
2	Rocket Docket Legal Soft...	Mr.	David		Brickman		1664 Western
3	Jones and Associates	Mr.	Thomas	A.	Jones	Jr.	123 Main Str

Edit Row | Insert Row | Delete Row | Close | Select

First | Previous | Next | Last | Finish

Use the Select Button to add or change the case attorney responsible for the current Answer File

You should add all attorneys in the firm into the database

Select

You store all of the firm attorneys and select them into the case - they may be changed at any time

The select button brings you into the database where you enter and select the case attorney

Enter Caption Information

Rocket Docket Library - HotDocs Developer

0 demo.anx

File Edit View Navigate Tools Help

Interview Document Preview Question Summary

Answer Questions in Interviews Below

- Select Lead Attorney
- Enter Caption Information
- Select Clients and Other Parties
 - 1: Acme Corp
- Draft Correspondence
- Select Supreme/County Court Clerk
- Select Judge
- Draft CPLR Forms
 - General Notices
- Article 3 - Service and Appearances
 - 1: John Doe
- Article 21 Stipulations
- Article 30 Pleadings
- Article 31 Disclosure
- Article 50 Judgments
- Article 55 Appeals
- Draft Motions
- Legal/Financial Calculators
- End of Interview

Enter Caption Information

Caption Information

Data entered here will be automatically inserted into all captions, letters and forms that require it

Enter the information as it becomes available (ie enter case numbers when they are issued)

Case Name/Title

Select: Civil Administrative

Party Types Plaintiff/Defendant Petitioner/Respondent Claimant/Respondent

Court Lower Court County Court Supreme Court

State New York

Venue County Nassau

Description of Action: Contract Claim

Index Number Purchase Date February 6, 2013

Index or DA Number 12345

RJI

RJI File Date:

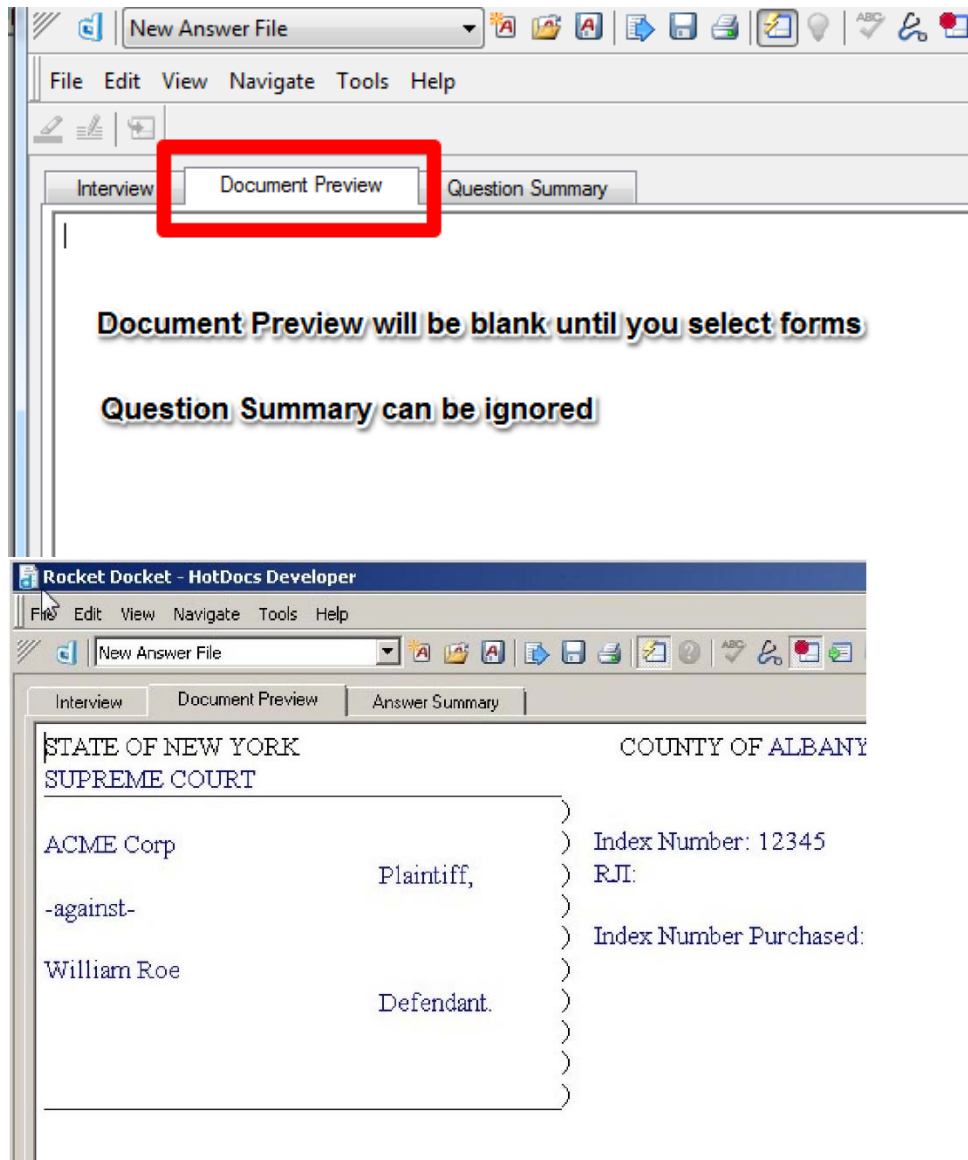
Enter Caption Information

Each Folder contains an Interview.

The Enter Caption Information Interview collects all of the information necessary to create captions automatically.

All of the information entered in this screen will automatically insert into every form and letter in the work flow with no further input.

Pleading captions are completely automatic with no input beyond this page and the Parties page where parties and their roles will be entered and selected.



Document Preview

You can check document preview after you have selected documents to assemble and determine whether the captions have filled correctly.

Clients and Parties Interview

All of your Microsoft Outlook contacts are entered into the system with a simple selection. From Outlook Click the Contact to bring into the case file. You must enter the contact into Outlook prior to using the select button as it is not possible to enter a new contact from the select button. There is a select button on the first page of the program where you can enter all of your new contacts at once. Once in Outlook they may be used in every case. The Interviews reveal the information to be entered into each screen

The screenshot shows the 'Interview' tab selected in the top navigation bar. The left sidebar contains a tree view of interview steps, with '2: Party' highlighted. The main content area displays instructions for adding parties, including a 'Bypass Outlook' button, a YouTube link for 'Party Interview', and a detailed explanation of the selection process. At the bottom, there are 'Select' and 'Add Another Party' buttons, with an arrow pointing to the 'Select' button and the text 'Enter Outlook by clicking Select'.

Interview | Document Preview | Question Summary

2: Party

Rocket Docket will keep track of multiple parties, their multiple roles and their attorneys. Add parties in the same order they will appear in captions.

Select every role the party will play because the forms are programmed to look for the roles allowing the parties to have multiple roles (i.e. Borrower and Guarantor)

Right click on "Party" in the Interview, for useful tools to copy, paste, and insert move up/down these repetitions.

Bypass Outlook

You Tube Party Interview

Use the select button below to enter Outlook
The contact must already be in Outlook before you select it with this Select Button
If the contact is not in Outlook or needs to be edited, make your changes directly in Outlook and then come back to this interview
Outlook may open behind another window and not be visible.
If this happens navigate to the open window and make your selection.
The program will not let you advance until you complete your selection.

Select Add Another Party

Enter Outlook by clicking Select



Form Interviews

Parcel Information

This interview collects information for deeds - mortgages - RP 5217 - TP 584 and many other forms.

Check the document preview window to confirm whether information is missing for the current form you are working on. Not all of the information is necessary in every form. Information entered here will be saved to the current answer file for future work.

Enter the information for the Tax Foreclosure in the Tax Foreclosure Answer Interview Below

Address Line 1	123 Main Street
Address Line 2	
City	Albany
State	New York
Zip	12202
City/Village - Leave Blank if Town	Albany
Town	
County	Albany
Number of Parcels	1
Property Class Code	483
SWIS Code	
Section (Tax Map ID)	21
Block	1
Lot	3
Prior Deed Date	April 18, 2005 
Prior Deed Record Date	April 20, 2005 
Prior Deed Liber/Book	4453
Prior Deed Page	332

Form Interviews

Interviews are fill in the blank.

Once the information is entered, every form in the system that requires a particular answer will pull the information without any further input.

All of the interviews work in the same way.

Not every question has to be answered in every work flow.

You can always check Document Preview to see if the current work flow is looking for a particular answer.

In Document Preview, asterisks indicate that a variable is unanswered.

Asterisks may be blue or red.

These unanswered fields may be right clicked and you will be brought to the directly question in the interview.

Forms

Forms are selected into the workflow with check boxes. Many of the forms will be ready to print by merely selecting them because the questions have already been answered.

Often selecting a form causes either questions to appear or an entire interview dialog to appear.

Once the questions are answered, check document preview and determine if you are ready to send to the word processor to finish.

CPLR General Notices and Clerk's Forms

Document Preview - After making selections check document preview to examine the work product

Deposition Notices and Subpoenas are repeated so you may prepare multiple forms for multiple recipients simultaneously

Appearance Forms

- ☒ Notice of Appearance
- ☐ Notice of Substitution and Appearance
- ☐ Acknowledgment of Service
- ☐ Consent to Change Attorney
- ☐ Client Appearance Waiver
- ☐ Affirmation of Engagement

Forms Relating to Documents

- ☒ Notice of Settlement
- ☐ Notice of Entry
- ☐ Copy Certification
- ☐ Document Rejection Notice

Clerk's Forms

- ☒ Index Number Application
- ☐ RJI UCS 840 Main
- ☐ RJI UD13 Uncontested Divorce
- ☒ RJI UCS 840M (Divorce)
- ☐ Note of Issue 202.12

Document Preview

STATE OF NEW YORK SUPREME COURT		COUNTY OF NASSAU
Acme Corp	Plaintiff,) Index Number: 12345
-against-) RJ:
John Q. Public	Defendant.) Index Number Purchased:
) 02/06/13
)
)
)
)

NOTICE OF APPEARANCE

PLEASE TAKE NOTICE, that Jones and Associates, Thomas A. Jones, Jr. of Counsel, an Attorney duly licensed to practice law in the State of New York and maintain an office for the practice of law at 123 Main Street, PO Box 234, Anytown, New York 12345, is appearing on behalf of Plaintiff Acme Corp herein.

Dated: February 6, 2015
Anytown, New York

Yours, etc.,

Jones and Associates
By: Thomas A. Jones, Jr.
Attorney for Plaintiff
123 Main Street
PO Box 234

Document Preview

Document Preview should be checked regularly to determine the progress visually.


It is easy to see what has been answered and what needs to be answered.

Fields can be right clicked and bring you directly to the questions in the interviews.

If you copy the document preview into the word processor, the colors are retained so you may easily see what needs to be answered or finished.

Time and Billing

TOTAL AMOUNT DUE FROM CLIENT:
\$0.00


[Retainer Time and Billing](#)

Disbursements

	Disbursement For:	Disbursement Amount	Disbursement Account	Check Number	Disburseme
1					
2					
3					
4					
5					

Time and Work Performed

Hide
☐ Partner
 ☐ Associate
 ☐ Paralegal

Make sure to enter the Partner/Associate/Paralegal time in the correct corresponding

	Date	Performed By	Partner Time	Associate Time	Paralegal Time	Work Perform
1			0.00	0.00	0.00	
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						

First
 Previous
 Next

Time and Billing

Time and Billing is extremely simple and extremely powerful.

Quite simply it does all of the math and then outputs it with a single mouse click.

Invoices and receipts are one click after the information is input.

As you can see in the illustrations below by merely selecting a form that requires the math, it is automatically input without any instruction at all because it was preprogrammed to do that.

As you change the math in the Time and Billing interview it automatically updates before your eyes in Document Preview.

Date		Time	Amount	Work Performed
10/18/13	Partner	2	\$500.00	Consult
10/18/13	Partner	1.5	\$375.00	Initial Filings
06/30/14	Partner	1.5	\$375.00	Consult and Initial Filing
07/17/14	Partner	0.3	\$75.00	Consult
07/22/14	Partner	0.3	\$75.00	conversation with Tabak
07/22/14	Partner	0.2	\$50.00	Consult
07/29/14	Partner	1	\$250.00	emails and responses
07/29/14	Partner	0.25	\$62.50	emails and responses
08/27/14	Partner	0.2	\$50.00	conversation with client Tabak
08/29/14	Partner	0.2	\$50.00	receive and review answer and file
09/05/14	Partner	0.2	\$50.00	affidavit in case w/ clerk
09/06/14	Partner	0.5	\$125.00	prepare net worth statement
09/07/14	Partner	0.25	\$62.50	prepare net worth statement
09/09/14	Partner	1.5	\$375.00	prepare motion
09/18/14	Partner	1	\$250.00	consultation w client
09/22/14	Partner	0.4	\$100.00	net worth demand; letter to tabak
10/15/14	Partner	0.25	\$62.50	consultation w client
10/28/14	Partner	0.2	\$50.00	request for conference
10/30/14	Partner	0.75	\$187.50	consultation w client
12/04/14	Partner	1.5	\$375.00	conference motion/submission
12/05/14	Partner	0.3	\$75.00	motion submissions and conference
12/10/14	Partner	0.5	\$125.00	Client consultation or correspondence
01/12/15	Partner	0.2	\$50.00	Client consultation and
01/27/15	Partner	0.35	\$87.50	Client consultation
02/06/15	Partner	0.75	\$187.50	Client consultation

Disbursements

RJI	\$95.00	October 28, 2014
Motion Fee	\$45.00	December 4, 2014

Partner Hours: 16.1 @ \$250.00/hr

Associate Hours: 0 @ \$200.00/hr

Paralegal Hours: 0 @ \$100.00/hr

Time Billed: \$4,025.00

Disbursements: \$140.00

Total Billed: \$4,165.00

Amount Received: \$5,000.00

Total invoice: \$-835.00

Invoices and Receipts

As with all of the other forms and letters, the math is calculated automatically behind the scenes.

When a form such as an invoice is selected for assembly, the math is automatically brought into the form in real time.

If you select an invoice any new invoice information entered prior to sending the form to the word processor will automatically update and be visible in document preview

Often the same calculations are used in different forms and letters. Every form and letter automatically updates so you never have to go from form to form making updating math manually.

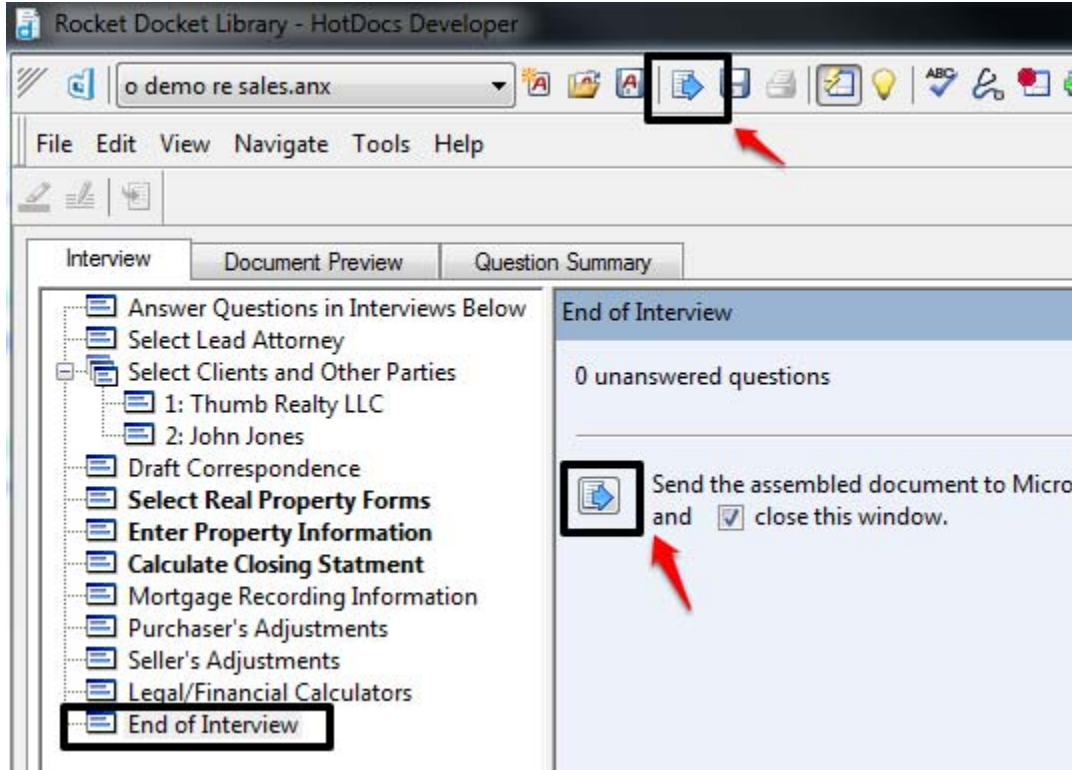
- ☐ § 234. Title or Exclusive Use of property
- ☐ § 236. PART B 5-a. Temporary maintena
- ☐ § 236. PART B 7 Child Support
- ☐ § 236. PART B b. (1) Modify Maintenan
- ☒ § 237. Counsel fees
- ☐ § 237. Expert Fees
- ☐ § 237. Appraisal Fees
- ☐ § 239 Stay on default of payment (Opp
- ☐ § 240 (a-1)(1) or (2) Custody
- ☐ § 240 (a-1)(1) or (2) Support
- ☐ § 240 (a-1)(1) (5) Temporary emergency

The math automatically pulls into the form in real time from the Time and Billing Interview.

COUNSEL FEES

6. I was retained by [Jane K. Doe](#) herein on [October 18, 2013](#).
7. I have been paid [\\$5,000.00](#) for work billed at an agreed upon rate of [\\$250.00](#) per hour for my services in this action.
8. A substantial portion of my practice is devoted to the prosecution, defense and negotiation of matrimonial and family court cases.
9. I have no agreements with anyone else regarding the payment of my attorney's fees.
10. I customarily charge [\\$250.00](#) per hour for matrimonial and family court cases.
11. [Plaintiff Jane K. Doe](#) paid an initial retainer in the amount of [\\$5,000.00](#).
12. To date [Plaintiff Jane K. Doe](#) has incurred legal fees in the amount of [\\$4,025.00](#) and disbursements in the amount of [\\$140.00](#) as appears by a copy of the current billing statement attached hereto.
13. This particular case will require extensive financial discovery including depositions in order to discern the scope of the marital estate and the parties' standard of living, which is relevant for both equitable distribution and maintenance.
14. We are requesting that the Court order [Defendant Jon C. Doe](#) to reimburse [Plaintiff Jane K. Doe](#) for the initial retainer paid in the amount of [\\$5,000.00](#).
15. I anticipate that an additional 50 hours will be required to prosecute this action fully and am requesting that the Court order [Defendant Jon C. Doe](#) to pay the additional sum of [\\$12,500.00](#) as and for temporary attorney's fees for [Plaintiff Jane K. Doe](#).

End of Interview



You may safely ignore any prompts that indicate that there are unanswered questions. There will always be unanswered questions as the interviews were designed to capture information for every form not just one in a given work flow.

-te*** and, ***Purcha

End of Interview

When you are ready to send you document to the word processor for finishing, there are 3 ways.

The End of Interview presents a button with a blue arrow. Clicking this button will send the document to the word processor but will prompt you to save the answer file and close Rocket Docket.

The blue arrow in the toolbar will send whatever is in document preview to the word processor without any prompts and will not close Rocket Docket.

You may also copy everything in the document preview and paste it into the word processor.

By copying the contents of the Document Preview you w=preserve the red and blue prompts so it will be easier to see what needs to be done to finish.

Another use full tip is to search your document for * to find any missed unanswered questions.



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